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DRAFT:
7 March 1967

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MEMORANDUM FOR: Acting Deputy Director for Science and
Technology

SUBJECT DD/S&T Program, Project, and Funds Approval

1. Part of the disarray over the handling of research and development and related contracts is due to the difficulty in separating out program and project reviews compounded by reviews of the Combined Program Call and annual budget call. Perhaps the following scheme might have some merit.

2. Combined Program Call. The Combined Program Call is primarily a forecast procedure and appears to operate reasonably well right now although the validity of the forecasts beyond the second year are subject to question since our programs are not really defined that far in advance. I recommend that there be some tidying up of the elements and sub-elements so that they are a little more meaningful. I am in the process of doing this for the Office of Research and Development at the present time. The Combined Program Call probably should not go below the level of the sub-elements into specific shopping lists.

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3. The annual budget submission as currently established seems to be adequate. In this case, a shopping list is required although I think in some cases projects on the shopping list could be combined. I would recommend that the approved budget after suitable review by BOB, the Director, and OPPB be forwarded to DD/S&T for its careful review before being allocated to the offices. It seems to me that this is the point at which the DD/S&T wishes to make readjustments and reprogramming. Ideally one would like to do this at the time of submission; but realistically there is too great a delay between submission and approved budgets for any realistic reprogramming. Once the funds have been allocated to the offices, they should then be considered authority to spend up to the limits of the sub-elements provided there are periodic program reviews and allowing for reprogramming by the DD/S&T.

4. Program Review. I believe that the DD/S&T should review ORD programs quarterly. This would provide him with an opportunity to indicate those specific projects which he would like to review, modify the level of effort in programs, modify the priorities, and surface changes in requirements and the like.

5. Project or Blue Book Review. It is my belief that review

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of individual blue books based upon their dollar cost is not a particularly effective mechanism for management at the DD/S&T level. It may be required that certain projects above a certain dollar value require the authorization of the DD/S&T or other senior officers. However, the natural flow of the blue books is often unpredictable and present top management with the problem of integrating many projects over a period of time. It would seem more economical to have programs approved by senior management and then allow the office to carry out the specific projects within the program subject to DD/S&T Staff review. The quarterly program reviews would also give the DD/S&T the opportunity to flag less costly projects which might be of considerable political importance but which he would not normally send, e. g., those with a high flap potential. The responsibilities for program and project reviews would then be essentially as listed in the attachment.

5. Summary. The purpose of this system would be to provide management with more meaningful review than they now have but without having multiple reviews of pieces of programs which I am sure is wasteful of time and probably confusing. It is recognized that senior management may wish to put additional constraints on the system such as review of our projects which exceed the appropriation for that program, review of new programs, and projects which do not fit within the approved programs.

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PROGRAM AND PROJECT RESPONSIBILITIES

DD/S&T

- A. Quarterly program review for relevance and level of effort.
- B. Periodic review of projects and programs of high priority to senior management.
- C. Approval of projects in excess of \$25,000 or as specified by quarterly review.
- D. Initiation of projects and/or programs deemed desirable by top management.
- E. Reprogramming of R&D contract funds in the light of changing requirements.

DD/S&T Staff

- A. Administrative review of contract actions to assure that
 - 1. Contract actions are appropriately documented and clearly written.
 - 2. Funds are available.
 - 3. Procurement action is taken in accordance with DD/S&T policy.
- B. Technical review of contract actions to assure that
 - 1. Proposals are in accordance with current DD/S&T approved programs and do not duplicate other on-going efforts within the DD/S&T or other directorates.
 - 2. Coordination of project proposals has been effected.

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PROGRAM AND PROJECT RESPONSIBILITIES (cont'd)

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- A. Development of specific contracts and grants in support of approved Agency programs.
- B. Technical selection of appropriate contractors to carry out the projects.
- C. Technical monitoring of contracts and grants following procurement action.
- D. Recommendations to the DD/S&T on the initiation, modification, or deletion of new or on-going programs and projects.
- E. Coordination of programs and projects within the Agency or other federal research and development organizations as appropriate.

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